TO: **Economic Support Supervisors
Economic Support Lead Workers
Training Staff
Child Care Coordinators
W-2 Agencies**

FROM: Amy Mendel-Clemens
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BHCE/BWP OPERATIONS MEMO
No.:   03-57
Date: 09/25/003
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Non W-2 [X]   W-2 [X]   CC [X]
PRIORITY: HIGH

SUBJECT: **THE NEW CARES AUTOMATED CASE DIRECTORY (ACD)**

EFFECTIVE DATE   September 30, 2003

PURPOSE

This memo informs CARES users of the availability of the new Automated Case Directory (ACD) available September 30, 2003. It explains what the ACD is, how to access it, why it's an improvement over the printed EOS case directory, and gives contact information in case there are problems accessing the ACD.

BACKGROUND

The printed EOS case directory reports will no longer be printed and mailed to each agency each month. The last printed case directories will be mailed to agencies in late September 2003. These reports will still be available in EOS. Those EOS report names and numbers are:

        C717   CARES-RP611A-RPC   CASE DIRECTORY
        C718   CARES-RP612A-RPC   CASE DIRECTORY-SUMMARY

Historical versions of these reports from prior months will continue to be available.

The Department of Health and Family Services (DHFS) and the Department of Workforce Development (DWD) have been working together to develop an online case directory to reduce printing and mailing costs, and to make it easier for users to find the case information they need to do their jobs.   A survey was conducted this year to find out what agency staff would like to see in an online case directory. The Departments used that information in designing the ACD.

The ACD consists of a series of reports called "Corporate Documents" that are created and saved on the Internet. Specific reports will answer specific types of questions about an agency, an office, an administrative unit, a supervisory unit, a caseload, or cases assigned to a specific worker.

BENEFITS OF USING THE ACD

- ACD reports are run weekly and therefore are an up-to-date view of the data in CARES. EOS case directory reports are run monthly.
- Once you learn how to use the ACD reports, it will be much easier to find the information you want. By using dropdown listboxes, you'll be able to filter out the information you don't want to appear on your report. For example, if you only want to see cases in your caseload that are pending, you simply choose your caseload number from a list of all caseloads and "pending" from a list of possible case statuses.
- Workers have the ability to save reports in Personal Documents, with the specific sorts and filters they have set up.
- Certain reports may be helpful as a food stamp error reduction tool. You'll be able to find error prone cases easier.
- The EOS case directory is still available. If you ever need to access a case directory in the old format, it will still be available, but only online with other EOS reports.
- You can export data from an ACD report to Microsoft Excel if you ever need to do further analysis on data, or want to create a mailing list with name and address information.
- Several of the ACD reports are geared for a specific worker type: The ES worker, the FEP, or the WP Case Manager. You can choose who a case "belongs to" based on the worker(s) assigned to the case.
- Since the ACD is online, reports can be accessed anywhere with an Internet connection.

USERS

Individual workers or managers can use the ACD reports. Anyone with access to CARES can get access to the ACD. Non-CARES users will not be allowed access.

Workers will find the ACD helpful in answering basic questions about their cases. Examples include:
- What cases are due for review in a specific month?
- What cases have not yet completed their review for this month?
- How many cases do I have? What types of cases are they?
- What cases have earned income or unearned income?
- What cases have an individual with a work program exemption reason, and what is it?
- What cases have individuals that have a specific living arrangement code such as "Homeless" or "Military Absence?"
- What cases have an individual receiving Foster Care or Kinship Care?
- What cases have an open CC AG when there is no authorization?

Managers will find the ACD helpful in answering broader questions:
- What are the total cases in my agency?
- What are the agency totals by case type?
- How do I create mailing labels for all cases in my agency or for a subset of cases in my agency?
- How can I tell who has specific case types so that I can better realign caseloads?
- What's the number of new cases for a worker this month?

- What's the number of closed or denied cases for a worker for this month?
- How do I find cases that are pending for more than 30 days, 90 days, or more?
- How do I find error prone cases that may cause a food stamp error if pulled for QC?
- Which of the cases in my agency are confidential?

HISTORICAL DATA

There is no history of the ACD reports. Each time you access the ACD, it reflects data as of the report run date, which displays in each report. When you open an ACD report, the data will be no more than a week old. Data for the reports will be refreshed each weekend and will reflect what was in CARES as of the report refresh date. If you want to see historical information, you must go to the EOS case directory report for that month. However, you are able to save a report with specific data to a Personal Documents Directory that is stored online. In this manner, you will be able to keep historical reports from the ACD.

ACCESS TO THE ACD REPORTS

- Current Data Warehouse Users:
  If you have access to any of the CARES DATA MARTS (FS, CC, Performance Standards, or W-2), in the CARES DATA WAREHOUSE, you will see the new ACD reports in your list of Corporate Documents in WebI when you log in after September 30, 2003. You will not need to do anything else.

- All Other Cares Users:
  All other CARES users that want access to the ACD must fill out the new Wisdom Applications Access Request form (DWSW-13916-E). It is available on the DWD/DWS Partner Page at: https://workweb.dwd.state.wi.us/forms/dws/DWSW_13916_E.htm

A DWD password is required to access this site. The instructions on filling out the form are clear. In #3 under "Access Requested", check off:

      "View Access to Wisdom Data" and
      "Automated Case Directory"

Follow all other instructions. The PDF form is fillable. Complete the form on line and print it. Ultimately, the form must be sent to the DWD/DWS security officer. Questions regarding security access to the ACD can be sent to DWD/DWS Security at 608-261-6827. You will be notified when your access has been granted. The website for accessing the ACD reports is given on the training website below.

INFOVIEW

Accessing the ACD is done through a tool called "InfoView". InfoView is where you first log in to the ACD. This will give you access to an application called "WebI", where the ACD reports are stored. The link to InfoView and the ACD reports is given on the training website below.

TRAINING

All training materials for the ACD are located on one website:
http://www.dwd.state.wi.us/destrain/AutoCaseDir/default.htm

This page:

- Describes the ACD;
- Tells how to get security access;
- Gives a link to a detailed training packet. This training packet is a pdf document that tells what the ACD website address is, how to access the reports, how to save and print reports, how to email them to other users, and much more**. All users of the ACD should read this training packet. There will be no face to face classroom trainings on the use of the ACD;**
- Gives a link to a powerpoint that provides an overview of the ACD. Managers may find this useful to present at unit meetings. The powerpoint also gives many case examples of how you may use the ACD;
- Gives a link to an activity pack of training exercises and answers;
- Describes how to sign up for training via the WisLine Web. WisLine is a distance learning method, which will allow the worker to sit at her/his desk, while on a conference call with the trainer and walk through the steps on her/his own personal computer.
- Provides phone numbers and email addresses in case you have questions.

CONTACTS

BHCE CARES Information & Problem Resolution Center

> Email: carpolcc@dhfs.state.wi.us
> Telephone: (608) 261-6317 (Option #1)
> Fax: (608) 267-2269

Note: Email contacts are preferred. Thank you.

NOTE ➢

DHFS/DHCF/BHCE/DH